

Webinar Day 4: Overview of Catalogs

June 5, 2014



Next Steps

Think through the following while we go through this session....

- Create and prioritize an inventory for your Departmental contracts
 - ✓ Contracts migrated to COMMBUYS
 - ✓ Contract that need to be created as Master Blanket POs from scratch
- Plan who should attend your Secretariat workshop and what priority topics you would like to discuss
- What contracts to bring to your Secretariat workshop to work through the transition to COMMBUYS

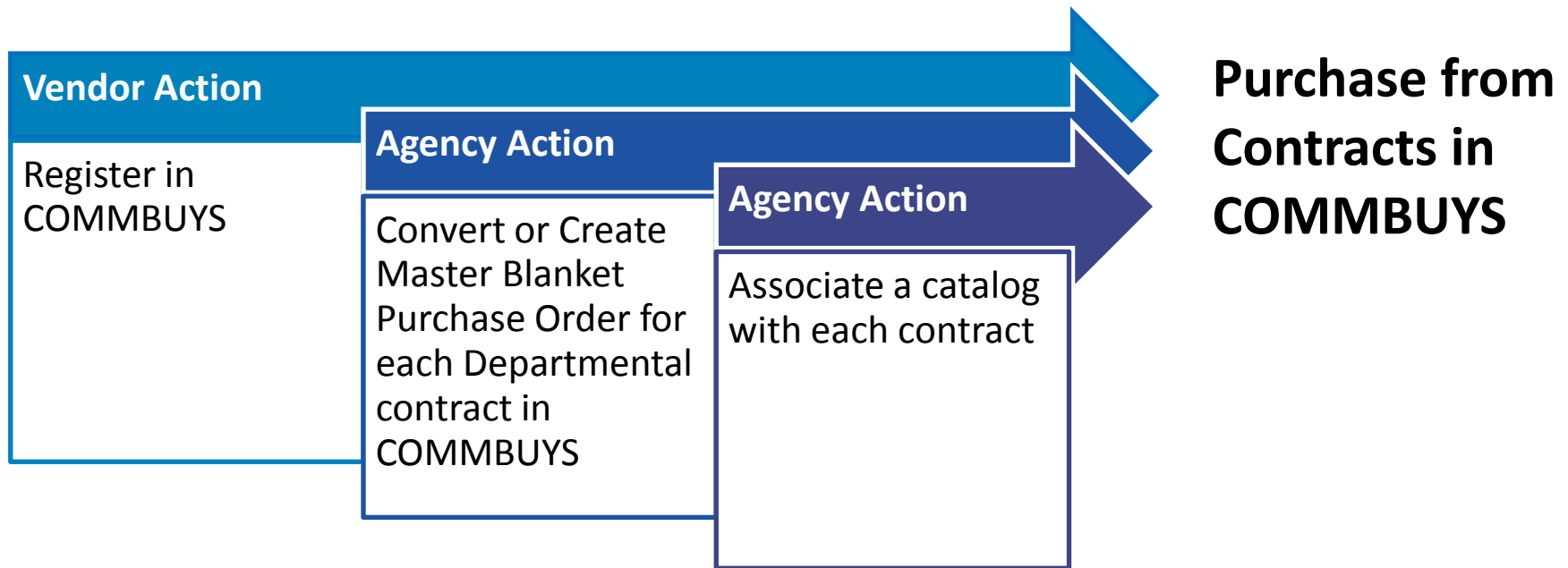
Goals for Today

- Explain how catalogs function in COMMBUYS
 - ✓ Explain how the pieces come together
- Review catalog “types” to be associated with Departmental contracts and vendors
- Explain the decision-making framework for assigning a catalog type
- Review steps in the catalog development process



Catalogs & Contract Enablement

Three elements come together to enable contract purchasing:



Catalog Types Based on Contract Structure

Single Vendor Contract

- Vendors with defined items with set pricing for each item
- Multi-line & detailed
- Examples: clothing, medical commodities, groceries

Multi-Vendor Contract (Distributor)

- Vendors within a contract that offers the exact same services or items
- At a fixed price or requires a quote (\$0.00 line item)
- Examples: Certain IT contracts, repair or maintenance service, or translators

PunchOut (G2B)

Vendors with defined prices, a large offering of items, and have the web capability to host a dedicated commerce website that will interface with COMMBUYS.

Example: NEOS and Grainger

Decision-Making Framework

**Which Catalog
should I use?**



**Decide
contract
model**

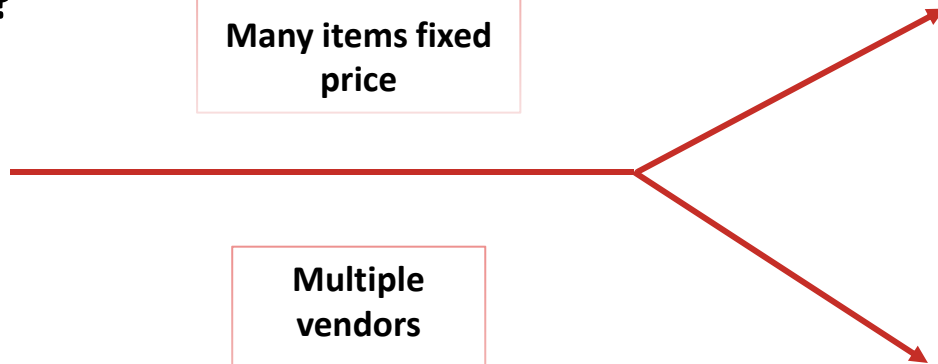
Single Vendor
Many items fixed
price

**Multiple
vendors**
Items quote
required
based on
scope

**Choose
appropriate
catalog type**


Line Item
Catalog template
Or Data Entry

**Distributor
Contract based
Catalog**
Data Entry



Vendor Catalog Set Up

Welcome To
COMMBUYS



OPERATIONAL SERVICES DIVISION

COMMBUYS is the only official procurement record system for the Commonwealth of Massachusetts' Executive Departments. COMMBUYS offers free Internet-based access to all public procurement information posted here in order to promote transparency, increase competition, and achieve best value for Massachusetts taxpayers.

COMMBUYS INFORMATION: For more information on COMMBUYS please visit us at [COMMBUYS](#). If you have any questions or concerns contact the COMMBUYS Help Desk at COMMBUYS@state.ma.us or ring us during normal business hours (8AM – 5PM Monday – Friday) at 1-888-627-8283 or 617-720-3197.

- [Register](#)
 Register here to begin using COMMBUYS.
 Vendors, please read this [disclaimer](#) prior to registering.
- [Complete Registration](#)
 Complete registration here to begin using COMMBUYS.
 Vendors, please read this [disclaimer](#) prior to completing registration.
- [Open Bids](#)
 Browse open bid opportunities.
- [Active Contracts](#)
 Browse active Contracts/Blankets.
- [Contract & Bid Search](#)
 Search for Bids and active Contracts/Blankets.
- [Registered Vendor Search](#)
 Search for registered vendors.

Login ID:

Password:

[Forgot your password?](#)



Vendor Catalog Set Up



UNSPSC Code Browse | My Account | Customer Service | About

Current Organization: Operational Services Division

April 10, 2014 10:36:21 AM EDT

Home Items Documents Vendors Quick Buy Find It Bonnie McCarthy

Home - Welcome Back Bonnie McCarthy

News(0) Reqs(0) Bids(7) PO(0) Approval(0) My Reminders(0) Events(0)

Vendor Catalog Set Up

Advanced Search

Search for:	Module: <input type="text" value="Purchasing Module"/>	Document Type: <input type="text" value="Contract/Blankets"/>
Search Using:	<input type="text" value="ALL of the criteria"/>	
<input type="button" value="Find It"/> <input type="button" value="Clear"/>		
Search Fields:	Contract/Blanket #	<input type="text"/>
	Contract/Blanket Description	<input type="text"/>
	Header Major Status	<input type="text"/>
	Vendor Name	<input type="text"/>
	Type Code	<input type="text"/>
	Catalog	<input type="text"/>
	Expiration Date(MM/DD/YYYY): From: <input type="text"/>	To: <input type="text"/>
	Item Description	<input type="text"/>
	Organization	<input type="text"/>
	U N S P S C Segment-Family	<input type="text"/>
	U N S P S C Class	<input type="text"/>
	Commodity-EPP	<input type="text"/>

PO Type

Buyer

Vendor Legal Name

Bid #

Stock Item Number

Vendor Catalog Set Up

Advanced Search ▾

Results

Contract/Blanket #	Description	Vendor Name	Organization	Status	Begin Date	End Date
C101576-V00000	05-9043-LABELS		Department of Correction	3PCO - Closed		
C101576-V00001	05-9043-LABELS		Department of Correction	3PCO - Closed		
C101576-V00002	05-9043-LABELS		Department of Correction	3PCO - Closed		
C101576-V00003	05-9043-LABELS		Department of Correction	3PCO - Closed		
C101576-V00004	05-9043-LABELS		Department of Correction	3PCO - Closed		
C101576-V00005	05-9043-LABELS		Department of Correction	3PCO - Closed		
C101576-V00006	05-9043-LABELS		Department of Correction	3PCO - Closed		
C101576-vCurrent	05-9043-LABELS		Department of Correction	3PS - Sent		

Exit

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Vendor Catalog Set Up

Master Blanket Purchase Order 0000051 Status: SPI - In Progress


General **Items** Vendor Routing Control Attachments Notes Change Orders Reminders Summary

General Notes

Item #: Print Sequence #: Item Type:

Item Status: SPI - In Progress Minimum Order Quantity: Stock Item Number:

Description #:



Receipt Method	Quantity	Unit Cost	Net Unit Cost	UOM	Discount %	Total Discount Amt.	Total
Quantity ▼	<input type="text" value="0.0"/>	<input type="text" value="0.00"/>	\$0.00	EA ▼	<input type="text" value="0.0"/>	<input type="text" value="0.00"/>	\$0.00

U N S P S C Segment-Family:

U N S P S C Class:

Commodity-EPP:

Tax Rate:

Tax Amount: \$0.00

Extended Amount: \$0.00

Manufacturer: Brand: Model:

Make: Packaging:

Save & Add New Save & Exit Save & Continue Reset Cancel & Exit

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Vendor Catalog Set Up

Commodity-EPP and Service Codes

Search

UNSPSC Segment-Family
UNSPSC Class
UNSPSC Keyword
Search using

UNSPSC Code Browse

Code	Description
<input checked="" type="radio"/> 80-10-15	Business and corporate management consultation services
<input type="radio"/> 91-10-19	Fashion consultants

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Vendor Catalog Set Up

Master Blanket Purchase Order 0000051
Status: SPI - In Progress

General
Items
Vendor
Routing
Control
Attachments
Notes
Change Orders
Reminders
Summary

General
Notes

Sort by Column: Print Sequence
☐ Sort Descending
Go

Item #	Print Sequence	Receipt Method	Quantity	Unit Cost	Net Unit Cost	Item Description UOM	Discount %	Total Discount Amt.	Tax Rate	Tax Amount	Total Cost	Delete
1	1.0	(80-10 - 15) Services	Quantity 0.0	\$0.00	\$0.00	EA - Each	0.00	\$0.00		\$0.00	\$0.00	<input type="checkbox"/>
Total											\$0.00	

Please save your changes before sorting. Otherwise, your changes will be lost.

Save & Continue
Search Inventory Items
Search Items
Add Item
Cancel & Exit

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Blanket Enablement Checklist

- ✓ Decide type of blanket (single vendor or distributor) and release type
- ✓ Add contract title to contract number in Short Description field
- ✓ Enter contact information in the Contact Instructions field
- ✓ Upload applicable attachments
- ✓ Create line items with user friendly information & accurate commodity codes
- ✓ Add vendors that are registered as COMMBUYS Sellers

Review of Readiness Program

Week of 6/2

Week of 6/9

Week of 6/16

Week of 6/23

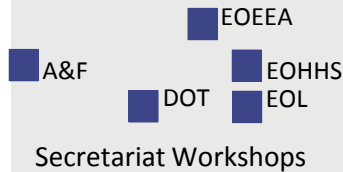
Agency Intensive Readiness Program



Daily Orientation Webinars



Overview of Buying in COMMBUYS Open Session



Overview of Buying in COMMBUYS Open Session



Agency Outreach Meetings



Ongoing Training

Purchasing from Catalogs



Conducting Procurements



Purchaser Drop-In Sessions



Vendor Training



'Searching in COMMBUYS' webinars



Agency Intensive Readiness Program

Secretariat Workshop

Secretariat workshops are scheduled for the next week and a half.

Administration & Finance (16 departments)	Monday, June 9 – 9 am – noon
Education (5 departments)	Monday, June 16 – 1-4 pm
Energy & Environmental Affairs (8 departments)	Thursday, June 12 – 1-4 pm
Health & Human Services (15 departments)	Friday, June 13 – 9-noon
Housing & Economic Development (10 departments)	Tuesday, June 17- 1-4 pm
Labor & Workforce Development (7 departments)	Friday, June 13 – 1-4 pm
Public Safety & Security (12 departments)	Monday, June 16 – 9-noon
Transportation (5 departments)	Wednesday, June 11 – 1-4 pm

Outreach team members also will work with agencies to schedule follow-up meetings onsite at agency locations.

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Think through the following:

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- Plan who should attend your Secretariat workshop and what priority topics you would like to discuss
- What contracts to bring to your Secretariat workshop to work through the transition to COMMBUYS
- What assistance your Organization Administrator might need with ongoing set-up of approval paths and user roles



Readiness Resource Center



[COMMBUYS Readiness Center](#)

Webcasts

- [Overview of COMMBUYS](#)
- [Basic COMMBUYS Navigation](#)
- [Searching for Contracts in COMMBUYS](#)
- [Purchasing from Statewide Contracts in COMMBUYS](#)
- [Approving Documents in COMMBUYS](#)



Webcasts

- [Overview of COMMBUYS](#)
- [Approving Documents in COMMBUYS](#)



Training Classes

- [Procurement in COMMBUYS: Creating Posting & Managing](#)



Job Aids

- [COMMBUYS Bids](#)



I Prepare Bids



Job Aids

- [COMMBUYS Requisitions](#)
- [COMMBUYS Purchase Orders](#)



I Buy from Contracts



Training Classes

- [Purchasing in COMMBUYS](#)

COMMBUYS Community Resource Map

Training Classes

- [Organization Set-Up and Maintenance](#)



I Administer My Organization



Job Aids

- [How to Maintain Organizations in COMMBUYS](#)
- [How to Set Up Approval Paths](#)
- [How to Maintain Agency Users](#)
- [More topics..](#)



Webcasts

- [Overview of COMMBUYS](#)



I'm a Vendor



Jobs Aids

- [Vendor Registration](#)
- [Create a Quote](#)
- [Access Purchase Orders & Change Orders](#)

Training

- [Locate and Respond to Bids](#)



Webcasts

- [Overview of COMMBUYS](#)
- [Vendor Registration in COMMBUYS](#)
- [How to Find Bids and Submit Quotes in COMMBUYS](#)
- [How to Find Your Purchase Orders in COMMBUYS](#)

Questions



We're here to help!

Questions? You can reach the COMMBUYS Help Desk by phone (1-888-627-8283) and by email (commbuys@state.ma.us).

More Information?

For Readiness Program resources: Please visit www.mass.gov/osd, click “OSD Events and Training” on the left of the page and then select “COMMBUYS Readiness Training.” Or navigate directly by following this link: <http://www.mass.gov/anf/budget-taxes-and-procurement/procurement-info-and-res/osd-events-and-training/commbuys-readiness-training.html>.

For additional information, such as Glossary of Terms, Terminology Crosswalk, policy documents and previously published job aids and webcasts, visit www.mass.gov/osd/commbuys and click “Key Resources” on the left of the page.